Handling Duplicates in CCTO
COVID-19 Community Team Outreach

Review the process below for avoiding duplicates when entering a new monitoring event:

Before Entering a Contact: Search by Key Information

Before entering a monitoring event (ME), you can review whether an ME already exists for this individual by searching the "**All Monitoring Events (Contact & Case)" View** by key pieces of information, such as:

- Last Name (and/or First Name)
- Phone Number
- Email Address
- Mailing Address

Open each result and check for matching information.

- **If the individual has an existing active ME,** speak with the owner and update it appropriately.
- **If the individual has an existing inactive monitoring event,** proceed to p. 6 of the Person Job Aid for steps to create a new monitoring event from their person record.
- **If the individual does not have any MEs within CCTO,** proceed with creating a new ME.

While Entering an ME: Duplicate Record Warning

If you attempt to save a monitoring event (ME) that the system has identified as a potential duplicate, you will receive a **Duplicate Record Warning.** Follow the process below:

1. **Right-click** on each linked entry and select **"Open link in new tab"** (or click the entry while holding down the CTRL or CMD key on your keyboard).

2. **Review each ME** and determine if it represents:
   - A **current, active ME within CCTO for the same individual. ACTION: DO NOT SAVE. Update the existing ME as needed and speak with its owner.**
   - A previous, **deactivated ME(s) for the same individual. ACTION: Proceed with saving and verify that the Person field is correct (matches inactive ME).**
   - Neither of the above, which means your ME is for **a new individual who has never been monitored in the Tool. ACTION: Click "Ignore and Save."**

① **"Open link in new tab"**

② **Review each ME and proceed accordingly**

DO NOT DEACTIVATE OTHER USERS' CONTACTS:
When handling duplicates, **remember that you should NEVER deactivate another user's contact.** If the contact you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.

Cause of Duplicate Warnings:
The system produces a duplicate warning when it finds a "matching" monitoring event based on the criteria below. **A duplicate warning does not necessarily mean any action is required – see step 2 on this page and next.**
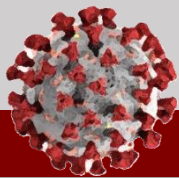
- First Name/Email
- First Name/Last Name/DOB
- First Name/Last Name/County
- First Name/Phone
- Phone/DOB

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Review the process below if you come across a duplicate warning on an existing ME in CCTO:

Discovering a Duplicate in CCTO

As a contact tracer, you may also come across a duplicate warning on an active monitoring event (ME). If you receive a **Duplicate Record Warning** or otherwise encounter a possible duplicate, **please check with your supervisor on local protocol**. In general, you may follow the process below:
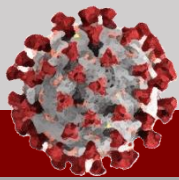
1. **Right-click** on each linked entry and select **"Open link in new tab"** (or click the entry while holding down the CTRL or CMD key on your keyboard).

2. **Review each ME** and determine if your contact:
   - Has another **current, active ME under monitoring. ACTION: Proceed to step 3.**
   - Has been previously monitored and has a **deactivated ME(s). ACTION: DO NOT proceed to step 3.** Verify the **Person field on your ME is correct and update it if needed per p.6 of the [Person Job Aid.](#)** Continue monitoring this individual.
   - Is not a duplicate and is **a new individual who has never been monitored in the Tool. ACTION: DO NOT proceed to step 3. Continue monitoring this individual.**

3. If your active contact ME is a duplicate of another active contact ME for the same individual, determine which ME contains the **most complete and current information. Review the ME's information fields, Timeline/Activities, Assessments, and Referrals. You may also need to reach out to the owner of the other ME to determine how to proceed.** The most complete and current event will become the event to continue monitoring.

4. Make a note **on both MEs indicating all the C#s of duplicates. This will allow for additional review of duplicate MEs.**

1	**"Open link in new tab"**
2	**Review each ME**
3	**Determine ME to be kept**
4	**Make notes of C#s**

DO NOT DEACTIVATE OTHER USERS' CONTACTS:
When handling duplicates, **remember that you should NEVER deactivate another user's contact.** If the contact you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.

Monitoring Event (ME) to be kept

Duplicate ME (contains an email address and exposure that are missing from event to be kept)

Review the process below if you come across a duplicate warning on an existing ME in CCTO:

5. Transfer **as much information as possible** from the duplicate event(s) onto the event to be kept. This includes adding contact info (including NC-COVID Event #s of Source Patients), making a note of any symptoms or resource needs identified through assessments, and writing a synopsis of any key info from Timeline/Activities.

The remaining steps only apply to duplicate MEs that you believe should not be kept. Per local protocol, these MEs will be evaluated by a specific team of people to be assessed and/or deleted. **Remember that you should never deactivate another user's contact** and that should reach out to the other user if you believe their contact is a duplicate.

6. For any duplicate MEs, **ensure that "Begin Monitoring?" is set to "No" and "Monitoring Status" is set to "Monitoring Ended."**

7. Set "Final Monitoring Outcome" **on any duplicate MEs to "Is Duplicate."**

8. **If the duplicate MEs are your own, you may be able to deactivate** them in alignment with your local protocol. If the duplicates belong to another user, contact the user and determine how best to proceed. Notify your supervisor to ensure you are following local protocol. **DO NOT delete any monitoring events.**

9. Continue with monitoring as normal on the kept ME.

5	**Transfer information**
6	**End monitoring**
7	**"Is Duplicate"**
8	**Deactivate**
9	*Continue monitoring*

DO NOT DEACTIVATE OTHER USERS' CONTACTS:
When handling duplicates, **remember that you should NEVER deactivate another user's monitoring event.** If the event you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.

Transferring info onto event to be kept

Closing and deactivating duplicate ME